

Events, Activities, Tasks and Further Actions in Applied Epic Part 2

SESSION HANDOUT

Prepared for Applied Client Network and Applied Systems

Applied Client Network

330 N. Wabash Ave., Suite 2000
Chicago, IL 60611
Phone: 312-321-6833
Fax: 312-673-6645

Applied Systems, Inc.

200 Applied Parkway
University Park, IL 60484
Phone: 708-534-5575
Fax: 708-534-8016

Copyright © by Applied Client Network, Inc., 330 N. Wabash Ave., Suite 2000 Chicago, IL 60611. . Protection claimed in all forms and matters of copyrightable material and information now allowed by law or hereafter granted including both electronic and conventional distribution of herein products. Reproduction or transmission unless authorized by Applied Client Network in writing. All rights reserved. Specific product information regarding Applied TAM, Applied Vision®, Applied Epic® and related products and services, including any related manuals, documentation, and/or materials prepared by Applied Systems for purposes of Applied Net 2018 or otherwise are the exclusive property of Applied Systems, Inc. Applied Systems retains all right, title, and interest therein, including copyright interests and other intellectual property rights. Information relating to products and services owned or licensed by third parties (ex: Microsoft, Excel, etc.) and all interests therein are the property of the respective owners, and no endorsement or ownership of third party products or services should be implied by their mention and use. All workflows are suggested and common workflows. Users of this material agree that neither Applied Client Network nor Applied Systems can be held liable for any omissions or errors within the guide.

Original Author:

Name:

Applied Systems

Organization Affiliation:

Date Updated:

Updated By:

Name:

Maureen Boeing, CIC, CISR

Organization Affiliation:

Maureen Boeing Consulting, LLC

Date Updated:

Aug 2014, 2015,
2016, 2017, 2018,
2019, 2020, 2021

Target Audience:

<input type="checkbox"/>	Accounting
<input type="checkbox"/>	Administration
<input type="checkbox"/>	Claims
<input checked="" type="checkbox"/>	Customer Service
<input type="checkbox"/>	Human Resources
<input checked="" type="checkbox"/>	IT
<input type="checkbox"/>	Legal

<input type="checkbox"/>	Marketing
<input checked="" type="checkbox"/>	Operations
<input type="checkbox"/>	Sales
<input type="checkbox"/>	Underwriting
<input type="checkbox"/>	ALL
<input type="checkbox"/>	Other: (describe)

Table of Contents

Prepared for Applied Client Network and Applied Systems	2
Original Author:	3
Updated By:	3
Target Audience:	3
Seminar Type:	5
Seminar Level:	5
Class Description:	5
Learning Outcomes:	5
Tasks and Further Actions	6
Configuration Basics	6
Configuration Detail	7
Creating Automated Workflows	11
Making Applied Epic Work for You - Activity Code Configuration Flowchart	11
Sample Automated Workflow	14
Create a Prospecting workflow	14

Seminar Type:

Servicing and Workflows

Seminar Level:

Basic: An introductory level course is basic in nature and addresses fundamental concepts. We expect attendees to have a basic level of insurance knowledge, have been oriented to an agency or brokerages' processes. For functional courses, it is not necessary for the attendee or participant to have previous knowledge of the agency or brokerage management system or software program.

Class Description:

Learn how to use Applied Epic more effectively by configuring Events, Activities, Tasks and Further Actions to build your workflows. In Part 2 of this two part series, we will dive into the details on activity configuration to take your workflows further. By learning the functionality of Tasks and Further Actions, we will discuss how to automate workflows, how to ensure consistency and accuracy for your staff.

Learning Outcomes:

- Learn the functionality of Tasks and Further Actions
- Ensure workflow completion and accuracy utilizing Tasks
- Identify ways activity configuration can automate workflows and provide ways to communicate seamlessly with your client by using Further Actions

Assumptions: This seminar is based on the following
Applied Epic 2021

Tasks and Further Actions

Configuration Basics

Further Actions

- An Activity can be configured to automatically do something in the future, for instance:
 - Close Activity
 - Generate an Activity
 - Leave Activity Open
 - Send a 2nd Request
 - Send a Letter
 - Send an SMS Text

- When / how triggered

- 2nd and 3rd Further Actions - **Enabled only if Send a 2nd Request, Send a Letter or Send an SMS Text is chosen in Further Actions**
 - Offers the following options on 2nd Further Action:
 - Close Activity
 - Generate an Activity
 - Leave Activity Open
 - Send a 3rd request
 - Send a Letter
 - Send an SMS Text

 - When/How triggered, what to do with original activity

 - If a 2nd Further Action of **Send a 3rd request, Send a Letter or Send an SMS Text** were chosen, then the following options are available on 3rd Further Action:
 - Close Activity
 - Leave Activity Open

Tasks

- Series of steps that need to occur in order to complete the Activity
- Tasks can serve as a checklist of things to do, reminders for the owner to do certain agency required tasks
- Who/Owner can be different for the activity follow-up and for tasks
- Start & Due dates can be different for tasks than for the activity follow-up

Configuration Detail

Activity Codes - Further Actions

- Close Activity
- Generate an Activity
- Leave Activity Open
- Send a 2nd Request
- Send a Letter
- Send an SMS Text

The screenshot shows the 'Activity Codes' configuration page in Applied Epic. On the left is a table of activity codes, and on the right is the 'Detail' configuration for a specific code.

Code	Description	Status
@RCA	Retain Cancellation	Active
@ROP	Reopen Opportunity	Active
@RPA	Renewal Policy Bound	Active
@RQS	Renewal Quote Started	Active
@RRA	Rebroke Renewal Polic...	Active
@RSI	Renumber Scheduled I...	Active
@RWO	Renew Opportunity	Active
@SIG	Send to eSignature	Active
@SMR	SMS Routed	Active
@SMS	SMS Sent	Active
@TMA	Temporary Mid-Term A...	Active
@TMR	Future Temporary Mid-...	Active
@TMS	Temporary Mid-Term A...	Active
@XOM	Excess Override - MTA	Active
@XON	Excess Override - New...	Active
@XOR	Excess Override - Rebr...	Active
@XOT	Excess Override - Tem...	Active
@XOW	Excess Override - Ren...	Active
ABOR	Agent/Broker of Recor...	Active

Detail

Code: **APOL**

Allow default description to be edited

Further Action Configuration:

- Action to take: Send a Letter
- Days until system action: 7
- System should: Leave Activity Open
- Reason: (empty)
- Follow up again: 1 days later
- From: Branch
- Subject: Welcome to Insurance Services
- Message: (empty)
- Template: Welcome to the Agj
- Cover page: sic Fax Cover Page

Note on Further Actions: Choosing *Send a 2nd Request* applies only to activities associated to certain Events that involve Distribution from Epic. The Further Action of sending a 2nd or 3rd request will re-send that initial item sent via Distribution.

Those Events utilizing Epic Distribution are:

- Agent/Broker of Record Change
- Close Binder Transaction
- Fax Sent Successfully
- Print Cancellation
- Print Lost Policy Receipt
- Review Application
- Review Change Request
- Submit Application
- Submit Cancellation
- Submit Change Request
- Submit to Carriers

Activity Codes – 2nd & 3rd Further Actions

- ❑ Offers the following options on 2nd Further Action:
 - Close Activity
 - Generate an Activity
 - Leave Activity Open
 - Send a 3rd request
 - Send a Letter
 - Send an SMS Text

- ❑ When/How triggered, what to do with original activity

- ❑ If a 2nd Further Action of Send a 3rd request, Send a Letter or Send an SMS Text were chosen, then the following options are available on 3rd Further Action:
 - Close Activity
 - Leave Activity Open

The screenshot displays the 'Activity Codes' configuration page in the AppliedNet 2021 system. The left sidebar lists various activity codes with their descriptions and statuses. The main area shows the configuration for the 'APOL' code. The '2nd & 3rd Further Actions' tab is selected, showing the 'Second Further Action' configuration. Key settings include:

- Code:** APOL
- Allow default description to be edited:**
- Further Actions:** Descriptions, Basic Settings, Further Actions, 2nd & 3rd Further Actions, Tasks, Time/Cost, Categories
- Second Further Action:**
 - Action to take: Generate an Activity
 - Activity Code: CALL
 - Days until system action: 7
 - Cover page: [dropdown]
 - System should: Close Unsuccessfully
 - Reason: Carrier - No response
 - Follow up again: [dropdown] days later
 - From: [dropdown]
 - Subject: [text field]
 - Message: [text area]
- Third Further Action:**
 - Action to take: [dropdown]
 - Days until system action: [text field]
 - System should: [dropdown]
 - Reason: [dropdown]

Activity Codes – Tasks

- ❑ Tasks – things to do associated with this Activity, can be entered here and will apply every time this activity is used or can be added by the user once the activity is added
- ❑ Previously Defined Tasks are added to the activity code in Configure and will appear on the activity each time the activity is added.
- ❑ Optionally, users can add Tasks to existing activities as they are added on an account. This creates work for the users and can lead to inconsistent workflows; before user defined tasks are used, consider whether they should be a part of that activity code every time it's added.
- ❑ Working with Tasks at Homebase
- ❑ Closing Activity / Task
- ❑ On Demand – Activity Timeline provides an overview of the tasks

The screenshot shows the 'Activity Codes' section of the Applied Epic software. On the left, there is a table listing various activity codes and their descriptions. On the right, the 'Detail' view for a specific activity code is shown, including a list of associated tasks.

Code	Description	Status
@RQS	Renewal Quote Started	Active
@RRA	Rebroke Renewal Polic...	Active
@RSI	Renumber Scheduled I...	Active
@RWO	Renew Opportunity	Active
@SIG	Send to eSignature	Active
@SMR	SMS Routed	Active
@SMS	SMS Sent	Active
@TMA	Temporary Mid-Term A...	Active
@TMR	Future Temporary Mid...	Active
@TMS	Temporary Mid-Term A...	Active
@XOM	Excess Override - MTA	Active
@XON	Excess Override - New...	Active
@XOR	Excess Override - Rebr...	Active

Task	Owner
Attach prior dec pages	Producer
Attach Photos	Producer
Order Loss Control	Loss Control Rep

The 'Edit Task' dialog box is shown with the following fields and values:

- Task:** Attach prior dec pages
- Owner type:** Producer
- Specific person:** (Empty dropdown)
- Start task:** 2 days After Activity Entered On at 12:00 AM
- Task due:** 1 days After Activity Follow Up/Start Date at 11:59 PM
- Comments:** (Empty text area)
- Buttons:** Finish (Green), Cancel (Grey)
- Footer:** 0.25s | ACTVTASK

On Demand > Activity Timeline

Print Preview

Print... Page Setup... Zoom 100% Page 1 of 1 Close

Activity Task Timeline

Activity Code/Description: APOL Added & PolType& policy effective & PolEffDate&

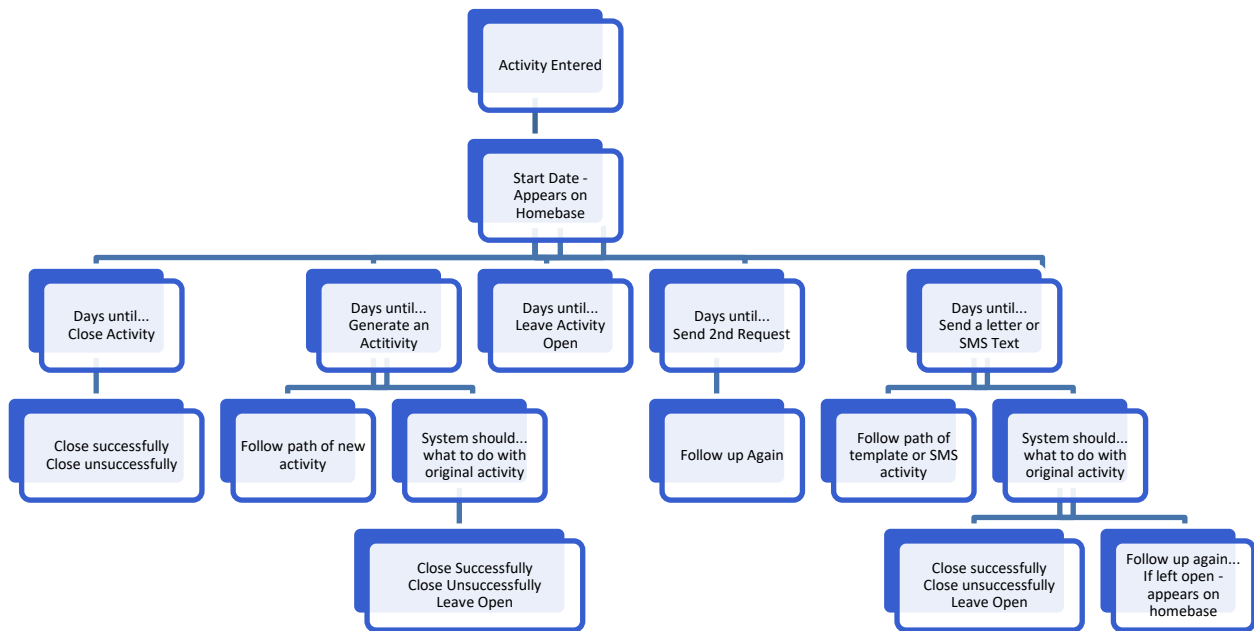
Activity Entered On: 8/1/2018
Follow Up/Start Date: 8/4/2018

Task Description	Start Date	Due Date	Owner
Attach prior dec pages	8/3/2018	8/5/2018	Producer
Attach Photos	8/5/2018		Producer
This is the next step	8/2/2018	8/8/2018	Loss Control/Rep

Creating Automated Workflows

Making Applied Epic Work for You - Activity Code Configuration Flowchart

Further Action Choices

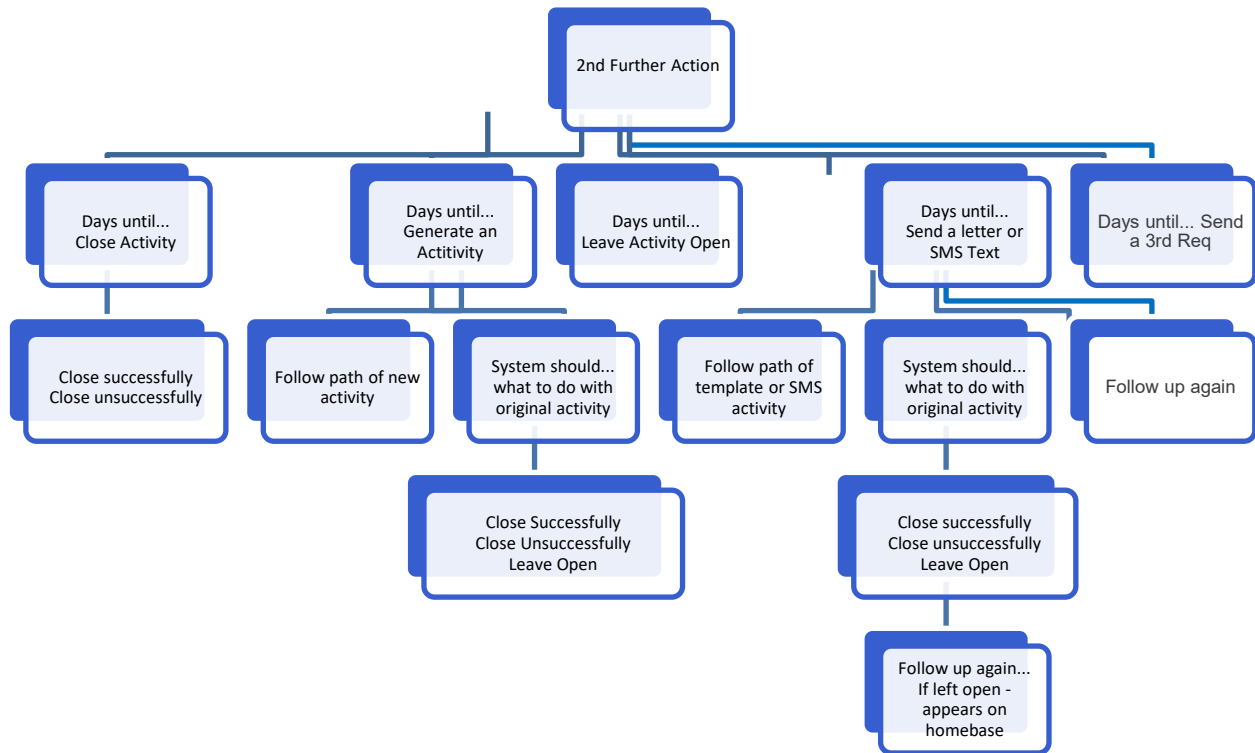


Automated Workflow Ideas:

- Welcome Letter to Client
- Claims Acknowledgment
- Endorsement Follow-up
- Prospecting Workflow (see Appendix)

2nd Further Action Choices

(Enabled only if *Send a 2nd Request*, *Send a Letter* or *Send an SMS Text* is chosen in Further Actions)

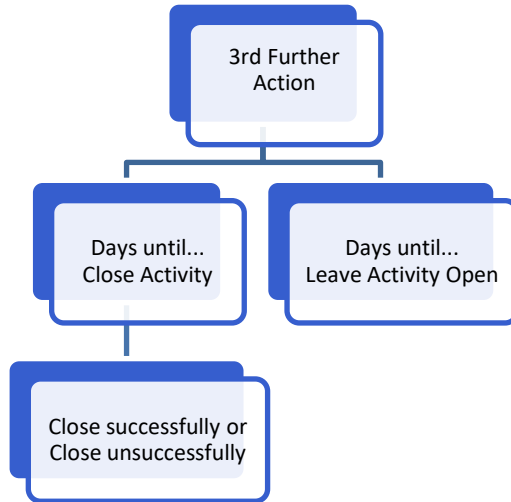


Note on Further Actions: Choosing *Send a 2nd Request* and *Send a 3rd Request* apply only to activities associated to certain Events that involve printing from Epic. The Further Action of sending a 2nd or 3rd request will re-send that initial item printed. Those Events are:

- Agent/Broker of Record Change
- Close Binder Transaction
- Fax Sent Successfully
- Print Cancellation
- Print Lost Policy Receipt
- Review Application
- Review Change Request
- Submit Application
- Submit Cancellation
- Submit Change Request
- Submit to Carriers

3rd Further Action Choices

(Enabled only if *Send a 2nd Request, Send a Letter or Send an SMS Text* is chosen in Further Actions)



Sample Automated Workflow

Create a Prospecting workflow

1. From Home Base, click **Configure > Activity > Codes**.
2. Select **ADOP** and then click **Edit**.
Note: *If this code does not exist in your system, click **Add** to create it.*
3. In the Description, click your cursor at the end of the description "Add Opportunity".
4. Type **for** and then click the **Description Variable Lookup**.
5. Select **Account Name** and then click **Finish**. This adds the &AcctName& variable to the description.
6. Deselect the **Allow default description to be edited** checkbox.
7. On the Basic Settings tab, verify the following values:
 - a. Owner Type = **User ID**
 - b. Priority = **Normal**
 - c. Default activity as = **Open**
 - d. Start activity = **0** day(s) after entered
 - e. When closing manually = **Default Successful**
8. On the Further Actions tab, enter the following values:
 - a. Action to take = **Send a Letter**
 - b. Template = **Click the Template Lookup**
Note: *If this template does not exist in your Applied Epic system, you can create it by accessing **Configure > Attachment > Templates > Templates – Prospect > Add**.*
 - i. In the Select Template window, select the following values:
 - ii. Account type = **Prospect**
 - iii. Template folder = **Marketing**
 - iv. Template = **Thank you for the opportunity to quote**
 - v. Click **Finish**.
 - c. Days until system action = **1**
 - d. Cover page = **Basic Fax Coverage**
 - e. System should = **Leave Activity Open** when further action is taken
 - f. Follow up again = **2** days later
 - g. From = **Branch**
 - h. Subject = **Thank you for the opportunity to quote your business!**
 - i. Message = **We appreciate the chance to work with you to meet your insurance needs. I will be in contact with you in the next few days to set up a meeting.**
9. On the 2nd & 3rd Further Actions tab, enter the following values:
 - a. Action to take = **Generate an Activity**
 - b. Activity code = **FEXD Exdate Follow Up**
Note: *If this code does not exist in your Applied Epic System, click **Add** to create it.*
 - c. Days until system action = **37**
 - d. System should = **Leave Activity Open** when further action is taken
10. On the Tasks tab, click **Add** and then enter the following values:
 - a. Task = **Schedule an appointment to conduct risk assessment**

- b. Owner type = **Producer**
 - c. Start task = **3** days **After Activity Entered On** at [blank time]
 - d. Task due = **3** days **After Activity Entered On** at [blank time]
 - e. Click **Add**.
 - f. Task = **Complete a new prospect risk assessment**
 - g. Owner type = **Producer**
 - h. Start task = **5** days **Previous Task Due Date** at [blank time]
 - i. Task due = **10** days **Previous Task Due Date** at [blank time]
 - j. Click **Add**.
 - k. Task = **Complete applications based on assessment**
 - l. Owner type = **Client Service Rep**
 - m. Start task = **1** days **Previous Task Due Date** at [blank time]
 - n. Task due = **3** days **Previous Task Due Date** at [blank time]
 - o. Click **Add**.
 - p. Task = **Submit applications to carriers for quote**
 - q. Owner type = **Client Service Rep**
 - r. Start task = **1** days **After Previous Task Due Date** at [blank time]
 - s. Task due = **2** days **After Previous Task Due Date** at [blank time]
 - t. Click **Add**.
 - u. Task = **Confirm quotes received**
 - v. Owner type = **Client Service Rep**
 - w. Start task = **5** days **Previous Task Due Date** at [blank time]
 - x. Task due = **10** days **Previous Task Due Date** at [blank time]
 - y. Task = **Prepare proposals**
 - z. Owner type = **Client Service Tech**
 - aa. Start task = **1** days **Previous Task Due Date** at [blank time]
 - ab. Task due = **2** days **Previous Task Due Date** at [blank time]
 - ac. Task = **Schedule an appointment to review the proposals**
 - ad. Owner type = **Producer**
 - ae. Start task = **1** days **After Previous Task Start Due Date** at [blank time]
 - af. Task due = **3** days **After Previous Task Start Due Date** at [blank time]
 - ag. Click **Add**.
 - ah. Task = **Conduct the proposal review meeting**
 - ai. Owner type = **Producer**
 - aj. Start task = **5** days **After Previous Task Due Date** at [blank time]
 - ak. Task due = **10** days **After Previous Task Due Date** at [blank time]
 - al. Click **Finish**.
 - am. Click **Finish**.
 - an. Click **OK** to Further Actions changes will not affect existing activities.
11. From the Options Bar, select **On Demand** and then **Activity Timeline**.
12. Review the report to ensure the workflow steps and timeline meets your agency needs.
13. Click **Close**.